

Steering Committee Meeting: Project Update

July 25, 2016

- Alan Shoho
- Berri Forman
- Beth Schafer
- Jerry Tarrer
- Jose Zafra
- John Kaiser-Huron
- Kathy Heath
- Kurt Dorschel-Huron
- Margie Anuson
- Paul Klajbor - for Brett Peters
- Peter Geissinger
- Prasenjit Guptasarma
- Randall Trumbull
- Robert Beck
- Suzanne Abler
- Sylvia
- Tamera Edmond - for Mark Jacobson

Welcome and Introduction

Jerry Tarrer started the meeting with introductions including new members to the Steering Committee and gave a brief overview of the agenda.

Charge for steering

Jerry went over the Charge for steering.

- We want to make sure that people participate in the checkpoints
- Take into consideration: policy and organizational impacts this projects will make to UWM people
- Looking for steering to be the voice of the campus, providing guidance.
- When reviewing status reports, make sure we are still on task.

ISSP Guiding principles

Jerry went over the guiding principles document.

- Improving the quality of service is the most important and the heart of what we are trying to do; Ensuring we delivering these services we provide are carried out to the best of their ability.
- Inclusiveness - recognizing we all have important work throughout the campus especially governance so we understand the impact of the work we are doing.
- We want to offer more opportunities to the people that work here.
- We don't want to diminish the quality of services in specific areas.
- We want to make sure we coordinate this work with other projects that are occurring all over the campus.

Jose Zafra posed a comment that while we are putting this out there, we should emphasize how this enhances teaching research student experience and so people can understand that this is part of the directive of the Chancellor.

Peter Geissinger agreed that we should explain why we are doing all of this, to provide the best possible service to our students which includes letting faculty and staff do the best possible job in Instruction & Research because the solutions may not always be the most efficient but you may have to decentralize to serve our students better. (Refer to Guiding Principle #1)

Jose also comments in regards to guiding principles #4 that we should clearly define expectations versus benefits for the staff.

Peter commented that role clarity should include role expectations.

Jerry responded that this was crafted so that the people that are delivering the service just as we want to make sure that faculty and students understand why we are doing this and to make it clear that there will be benefits to those delivering the service.

Jose talked about the reality is that we will have to cut staff and we should communicate that.

Jerry responded that we don't know that and it is premature to say we are cutting staff for sure.

Kathy also responded that guiding principle #6 tried to incorporate what Jose is referring to. The idea is that as we work through the transitional design, we will understand the staffing levels we are expecting for the functions, who is currently involved for providing, delivering those services across the campus. The implementation plan will include a transition period where individuals will understand the possible impact on them and have control over the decisions they make for themselves on how they will be engaged in whatever process we have in place to transition from the current model to the future model. This is a thoughtful process that we are considering people and working with people.

Peter Geissinger commented that maybe we should emphasize the benefits but also, the opportunity to develop within the new function and the roles that could come with that and to emphasize the professional development which is key. (Refer to Guiding principle#4)

Jerry asked for feedback in regards to this documents and offered the opportunity to send Sylvia Banda or Kathy Heath any more questions or other input.

Huron Engagement

Kurt gave an update on Huron

In depth analysis and building on this information to understand it and incorporating familiarity form previous projects.

- Reviewing change management plan and implementing
- Different decisions made will balance variables - decisions that best align with the options seeking
- Detailed design will follow after Huron's involvement
- Two activities seen happening in parallel
 - Understanding services and defining them; changing the assignments of work
- There are data limitations in certain function areas.

- There are 4 functions in scope
IT
HR
Finance
Procurement

John Kaiser went over the slide of Huron completed steps and what the next steps are

ISSP Communication Update

Robert Beck went over the Communication update

- 100s of staff will be affected by the changes this project will bring.
- Being effective and efficient as possible.
- Wants staff to feel aware of what is going on
- Success of the project will be tied into the communication of the project.

Key Decisions

Robert Beck went over Key Decisions

- This document derived from research from other institutions that have done a revision of their shared services.
- We want a customer service ethic
- Be mindful about the decisions ahead and how it will affect a lot of people.

Upcoming work in progress check point for steering

August 8th Meeting - hopes to have a model structure

- These models will be Huron's best interpretation

Q&A- the group was invited for any feedback

- *How can we be clear about the fact that lots of people will be impacted when roles start to be organized and Positions will be impacted, what are some clear talking points to convey this message?*

Comments/Feed Back/Answers

- *Wants to retain the talent we have as much as possible, convey the opportunities that will become available*
- *Want to portray the visions that this will make us better as a campus.*
- *Make sure that we address the positive also in line of negative comments*
- *There will be time for people to understand, time to gain perspective about the new changes, there will be time to provide in depth communication*

- *Communication is continuous to help people understand and the benefits and needs the steering committee to help us communicate this to the campus.*
- *Communicating to why some positions are going to be eliminated but why we are also reposting positions and looking for new people to understand our approach while we are re-organizing*
- *Better communicating that if positions are eliminated, they will go into a pool to take precedent in positions that become available so that they can gain first priority.*